6. Assign a Requisition to a Buyer

6.1 Introduction

This procedure describes how requisitions that are forwarded to a contracting office are assigned to individual buyers. In CSPS, requisitions are received within the contracting office by “Expediters”. Expediters are individuals who review incoming documents for sufficiency and/or basic completeness and then assign the documents to buyers. Expediters review and assign requisitions via the CSPS “Procurement Action Management Screen” (PR600).

6.2 Who Performs the Procedure

Expediters will be responsible for reviewing all unassigned requisitions and assigning them to a buyer or a contracting officer.

6.3 Initiating the Process

The expediting process begins when a new requisition appears on the expediting screen. This serves as the first point of receipt in the Procurement Office.

Prior to assigning the requisition to a buyer, the expediter should: ensure that the requisition belongs in the current contracting office, ensure that the requisition is appropriate for processing through CSPS (i.e., it is not a contract or purchase card transaction), review the document for basic completeness, and review each buyer’s current workload.

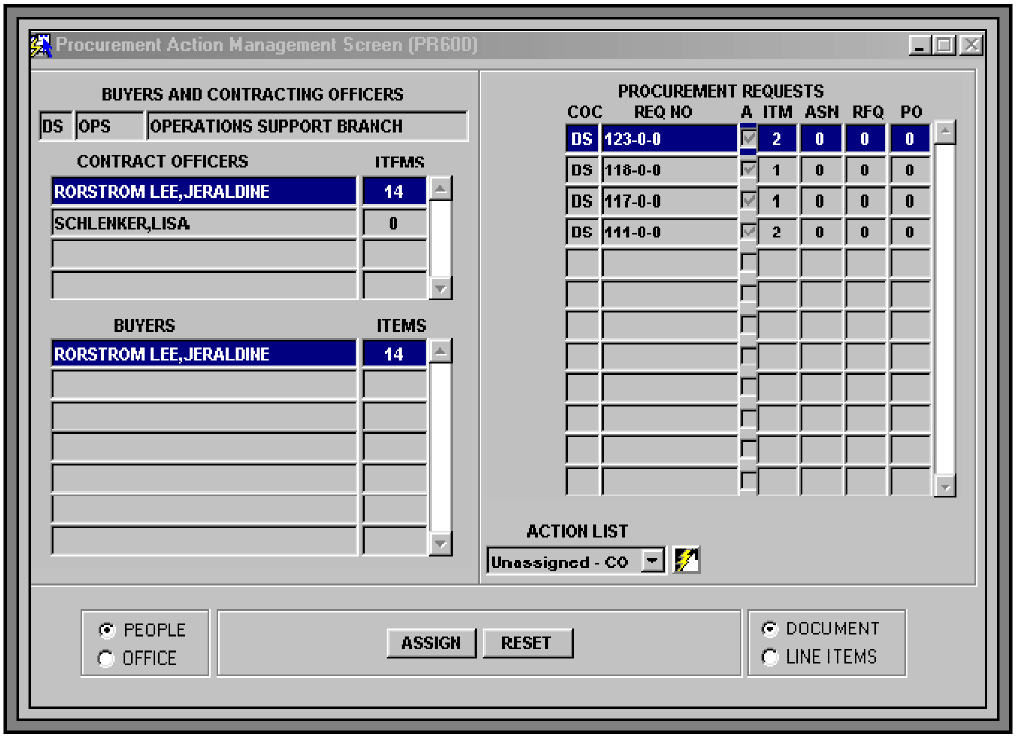
6.4 Accessing the System

From the Main Menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select “PR600 - Procurement Action Management”. Follow the steps below for PR600.

6.5 Viewing a Requisition

This procedure describes the steps necessary to view a requisition from the Procurement Action Management Screen.

PR600 - Procurement Action Management Screen



BUYERS AND CONTRACTING OFFICERS

DS | OPS | OPERATIONS SUPPORT BRANCH

CONTRACT OFFICERS	ITEMS
RORSTROM LEE,JERALDINE	14
SCHLENKER,LISA	0

BUYERS	ITEMS
RORSTROM LEE,JERALDINE	14

PROCUREMENT REQUESTS

COC	REQ NO	A	ITM	ASN	RFQ	PO
DS	123-0-0	☑	2	0	0	0
DS	118-0-0	☑	1	0	0	0
DS	117-0-0	☑	1	0	0	0
DS	111-0-0	☑	2	0	0	0

ACTION LIST: Unassigned - CO

● PEOPLE
○ OFFICE

● DOCUMENT
○ LINE ITEMS

STEP	ACTION
1.	On the lower right side of the screen, the default is set to **DOCUMENT** "view". Double click on the **REQ NO** field to view the requisition in read-only mode. The "Purchase Request Screen" (FM030) will appear and all applicable data will be displayed. Note: To view a "high level" listing of requisition information on a line item by line item basis, click on the **LINE ITEMS** radio button in the lower right side of the screen. This will display all requisitions listed by line item. Otherwise, to view requisition information in "document view" leave the default set to **DOCUMENT**.

STEP	ACTION
2.	Click the “Exit” icon on the toolbar or the “PREV” button to close the FM030 and return to the PR600 screen.

6.6 Reviewing a Buyer's Current Workload

This procedure describes the steps necessary to review a buyer's current workload.

STEP	ACTION
1.	Click the **LINE ITEMS** radio button to view requisition information in "line item view".
2.	Double click on the **BUYER** field to select a buyer from the list-of-values. Highlight the buyer's name and click "OK".
3.	Click the ACTION LIST drop-down menu and select the CURRENTLY ASSIGNED option.
4.	If the screen does not automatically execute the search, click the "Execute Action" button (i.e., the lightning bolt button on the lower right side of the screen) to initiate the search. The requisition line items currently assigned to the buyer will appear on the right side of the screen.

6.7 Assigning a Requisition to a Buyer

This procedure describes the steps necessary to assign a requisition to a buyer.

STEP	**ACTION**	
	IF...	**THEN...**
1.	The expediter needs to assign an entire document to a Buyer...	Review the screen and make sure that “unassigned” requisitions are displayed in “document view”. If unsure: a. Click the **DOCUMENT** radio button to view the requisition information in “document view”, and b. Click the ACTION LIST drop-down menu and select the UNASSIGNED option. Note: Follow the previous steps to view other categories found in the ACTION LIST drop-down menu. Note: Proceed to Step 3 to continue assigning the entire requisition to a buyer.

<table>
<tr><th rowspan="2">STEP</th><th colspan="2">ACTION</th></tr>
<tr><th>IF...</th><th>THEN...</th></tr>
<tr><td>2.</td><td>An expediter needs to assign an individual line item to a Buyer....</td><td>a. Review the screen and make sure that “unassigned” requisitions are displayed in “line item view”. If unsure:
b. Click the LINE ITEMS radio button to view the requisition information in “line item view”, and
c. Click the ACTION LIST drop-down menu and select the UNASSIGNED option.
Note: Follow the previous steps to view other categories found in the ACTION LIST drop-down menu.
Note: Proceed to Step 3 to continue assigning a line item to a buyer.</td></tr>
<tr><td>3.</td><td colspan="2">To select the requisition or line item to be assigned, depending on whether you are in “document” or “line item” view respectively, click once on the REQ NO.</td></tr>
<tr><td>4.</td><td colspan="2">To select the buyer to whom the requisition or requisition line item will be assigned, click once on the buyer’s name.
Note: If multiple contracting officers with multiple buyers are established in a single contracting office, it is necessary to first select the applicable contracting officer before selecting the buyer.</td></tr>
<tr><td>5.</td><td colspan="2">Click the ASSIGN button to assign the requisition or requisition line item to the buyer. A pop up box will appear asking you to enter the proper procurement type for the requisition. Select the appropriate type from the list of values and click “OK”. (Note: This selection is used to track processing actual lead time (PALT) time). A message confirming the assignment will appear on the screen. Click “OK” to confirm the assignment or click “CANCEL” to cancel the assignment.</td></tr>
</table>

6.8 Assigning the Requisition to Another Contracting Office

This procedure describes the steps necessary to assign a requisition to another contracting office.

STEP	ACTION
1.	Review the screen and make sure that: the requisition to be assigned to another contracting office is displayed, the right side of the screen is in "document view" and the left side of the screen is in "office view". This is done by: a. Clicking the **DOCUMENT** radio button to view the requisition information in "document view", b. Clicking the **OFFICE** radio button to view requisition information in "office view", and c. Click the ACTION LIST drop-down menu and select the UNASSIGNED option. Note: A document that has been assigned to a buyer in one contracting office cannot be assigned to another contracting office. Therefore, only an "unassigned" document can be assigned to another contracting office.
2.	To select the requisition to be assigned to another contracting office, click once on the **REQ NO**.
3.	To select the contracting office to which the requisition will be assigned, click once on the **CONTRACTING OFFICE NAME**.
4.	Click the "ASSIGN" button to assign the requisition to another contracting office. A pop up box will appear asking you to enter the proper procurement type for the requisition. Select the appropriate type from the list of values and click "OK". (Note: This selection is used to track processing actual lead time (PALT) time). A message confirming the assignment will appear on the screen. Click "OK" to confirm the assignment or click "CANCEL" to cancel the assignment.

6.9 Assigning the Requisition to Contracting Office ‘XX’

This procedure describes the steps necessary to assign documents identified as contract actions to contracting office ‘XX’.

Note: Contracting code ‘XX’ is a “dummy” code used to identify obligation documents that should be processed using the CFS “Obligation Screen” (FM040), rather than the CSPS “Purchase Order Screen” (FM041).

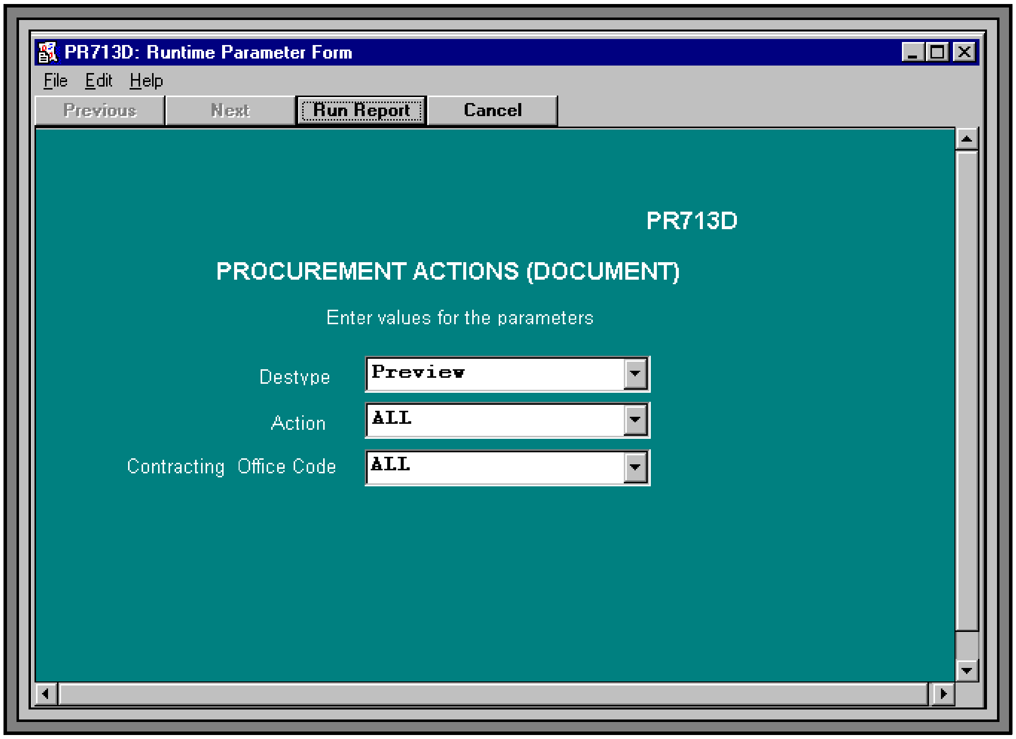
STEP	ACTION
1.	Review the screen and make sure that: the requisition to be assigned to contracting office ‘XX’ is displayed, the right side of the screen is in “document view”, and the left side of the screen is in “office view”. This is done by: a. Clicking the **DOCUMENT** radio button to view the requisition information in “document view”, b. Clicking the **OFFICE** radio button to view requisition information in “office view”, and c. Click the ACTION LIST drop-down menu and select the UNASSIGNED option. Note: A document that has been assigned to a buyer in one contracting office cannot be assigned to contracting office ‘XX’. Therefore, only an “unassigned” document can be assigned to contracting office ‘XX’.
2.	To select the requisition to be assigned to contracting office ‘XX’, click once on the **REQ NO**.
3.	To select contracting office ‘XX’, click once on the CONTRACTING OFFICE CODE ‘XX’.

STEP	ACTION
4.	Click the “ASSIGN” button to assign the requisition to contracting office ‘XX’. A pop up box will appear asking you to enter the proper procurement type for the requisition. Select the appropriate type from the list of values and click “OK”. (Note: This selection is used to track processing actual lead time (PALT) time). A message confirming the assignment will appear on the screen. Click “OK” to confirm the assignment or click “CANCEL” to cancel the assignment.

6.10 Printing (Running) the Procurement Actions Reports

This procedure describes the steps necessary to run the "PR713D - Procurement Actions (Documents)" report and the "PR713I - Procurement Actions (Items)" report.

PR713D - Runtime Parameter Form (Procurement Actions)



PR713D

PROCUREMENT ACTIONS (DOCUMENT)

Enter values for the parameters

Destype: Preview

Action: ALL

Contracting Office Code: ALL

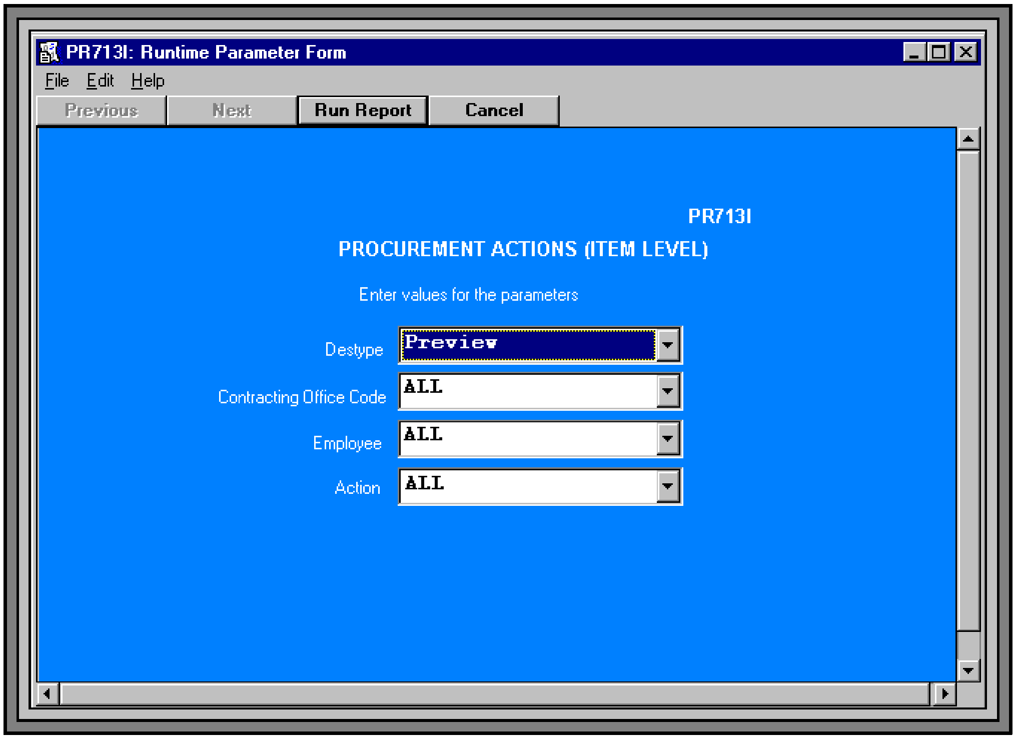
STEP	ACTION
1.	To run the "PR713D - Procurement Actions (Documents)" report, From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select "PR713D - Procurement Actions (Docs)". This report summarizes procurement actions at the document level.
PR708: Runtime Parameter Form	

STEP	ACTION
2.	To select the destination of the report, click the pull down menu in the **DESTINATION** field and select the appropriate destination: 1. To view the report on the screen, select “Screen”. 2. To send the report to a specific file, select “File”. 3. To send the report to the printer, select “Printer”. 4. To send the report to a mail file, select “Mail”. 5. To view the report on the screen, select “Preview”. After selecting the destination, go to Step 3.
3.	To select the action (i.e assigned, unassigned, etc.) for the report, click the pull down menu in the **ACTION** field and select the appropriate action. Note: To run a report for all actions, select “All”.
4.	To select the contracting office that the report should be run for, click the pull down menu in the **CONTRACTING OFFICE CODE** field and select the appropriate contracting office code. Note: To run a report for all contracting office codes, select “All”.
5.	Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 7.
6.	Click the “CANCEL” pushbutton to cancel the report selections made. Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.

STEP	**ACTION**	
	IF...	**THEN...**
7.	The destination selected is "Screen" or "Preview"... and The "RUN REPORT" pushbutton is clicked...	1. To go to the next page of the report, click the "NEXT" pushbutton. 2. To go to the previous page of the report, click the "PREV" pushbutton. 3. To go to the last page of the report, click the "LAST" pushbutton. 4. To go to the first page of the report, click the "FIRST" pushbutton. 5. To go to a specific page of the report, enter the page number and then click the "PAGE" pushbutton. 6. To print the report, click the "PRINT" pushbutton. 7. To send the report to a mail file, click the "MAIL" pushbutton. This functionality is currently not available. 8. To close the report, click the "CLOSE" pushbutton. 9. To open a second report window, click the "NEW" pushbutton.

STEP	ACTION
8.	To run the "PR713I - Procurement Actions (Items)" report, From the Main Menu, select Reports. From the Reports menu, select Procurement. From the Procurement menu, select "PR713I - Procurement Actions (Items)". This report summarizes procurement actions at the item level.

PR713I - Runtime Parameter Form (Procurement Actions)


PR713I: Runtime Parameter Form
File
Edit
Help
Previous
Next
Run Report
Cancel

PR713I
PROCUREMENT ACTIONS (ITEM LEVEL)
Enter values for the parameters

Destype: Preview
Contracting Office Code: ALL
Employee: ALL
Action: ALL

STEP	ACTION
PR713I: Runtime Parameter Form	

STEP	ACTION
9.	To select the destination of the report, click the pull down menu in the **DESTINATION** field and select the appropriate destination: 1. To view the report on the screen, select “Screen”. 2. To send the report to a specific file, select “File”. 3. To send the report to the printer, select “Printer”. 4. To send the report to a mail file, select “Mail”. 5. To view the report on the screen, select “Preview”. After selecting the destination, go to Step 3.
10.	To select the contracting office that the report should be run for, click the pull down menu in the **CONTRACTING OFFICE CODE** field and select the appropriate contracting office code. Note: To run a report for all contracting office codes, select “All”.
11.	To select the buyer that the report should be run for, click the pull down menu in the **EMPLOYEE** field and select the appropriate buyer. Note: To run a report for all buyers, select “All”.
12.	To select the action (i.e assigned, unassigned, etc.) for the report, click the pull down menu in the **ACTION** field and select the appropriate action. Note: To run a report for all actions, select “All”.
13.	Click the “RUN REPORT” pushbutton to execute the selection made. Proceed to Step 15.
14.	Click the “CANCEL” pushbutton to cancel the report selections made. Note: Upon clicking the “CANCEL” button the Runtime Parameter Form will close and exit the user to the last active screen.

STEP	**ACTION**	
	IF...	**THEN...**
15.	The destination selected is “Screen” or “Preview”... and The “RUN REPORT” pushbutton is clicked...	1. To go to the next page of the report, click the “NEXT” pushbutton. 2. To go to the previous page of the report, click the “PREV” pushbutton. 3. To go to the last page of the report, click the “LAST” pushbutton. 4. To go to the first page of the report, click the “FIRST” pushbutton. 5. To go to a specific page of the report, enter the page number and then click the “PAGE” pushbutton. 6. To print the report, click the “PRINT” pushbutton. 7. To send the report to a mail file, click the “MAIL” pushbutton. This functionality is currently not available. 8. To close the report, click the “CLOSE” pushbutton. 9. To open a second report window, click the “NEW” pushbutton.